8628/inst.

Department of the Treasury
Internal Revenue Service

Instructions for Form 8628
(May 1989)

Request for Federal Income Tax Forms for Banks and Post Offices

1. Account Number
Preprinted by IRS. Please refer to this number when placing an order or making an inquiry.

2. Survey Date
Preprinted date of survey.

3a. Current Address
Make sure that the address information printed on your survey order form is correct. If any information is incorrect, changes should be made in section **3b.**

3b. Address Change
Complete this section **only** if the address in section **3a** is incorrect. Fill in only the information that is incorrect or needs to be added.

Plan 9 and above will be shipped by tractor trailer. **We must have a street address for these shipments.**

4a. Current Contact Name and Telephone Number
This is the current contact person's name and telephone number on our files. If this is incorrect, make corrections in section **4b.**

4b. Corrected Contact Name and Telephone Number
Complete this section **only** if the contact person or telephone number has changed or there is no information in section **4a.**

5. 1040 Family
We have preprinted in block five (Form 8628), the quantity of Form 1040 ordered on your survey last season. If that quantity **does not meet your needs,** refer to **Table 1, 1040 Plan Structure** to determine the 1040 quantity that best meets the demand of your patrons. Please indicate the changed quantity of Form 1040 needed in the box directly below the quantity that you ordered last year.

Several of the 1040 plans have been modified for this year. Some adjustments have been made in the ratio of 1040 A, 1040 EZ, and 1040 Schedule A&B. These were made as a result of changing usage for these forms as indicated in recent Taxpayer Usage studies. Refer to **Table 1, 1040 Plan Structure** to review the modified Plan quantities.

Table 1 - 1040 Plan Structure lists only the quantity of the six 1040 items through plan 15. Higher plans may be ordered. For each increase in plan number, after plan 7, the 1040 quantity increases by 3000. 1040 A, 1040 EZ, 1040 Schedule A & B, 1040 Instructions and 1040 A & EZ Instructions are also increased proportionately.

* U.S. GPO:1989-242-483/04110

Alaska Customers
Customers in Alaska have stated that most residents of their state file a Form 1040. Therefore, if the Plan Structure in Table 1 does not meet your needs, order the items that you need individually on the back of Form 8628.

Table 1 - 1040 Plan Structure

	1040	1040 A	1040 EZ	1040 A & B	Inst. 1040	inst. 1040 A&EZ	Est. Total Cartons
Plan 1	50	30	30	30	20	30	1
Plan 2	100	75	75	75	30	45	1
Plan 3	300	250	250	150	45	50	1
Plan 4	500	350	350	400	90	80	2
Plan 5	1000	750	750	600	140	160	3
Plan 6	1500	1000	1000	800	165	225	4
Plan 7	3000	1500	2000	1500	330	450	8
Plan 8	6000	3000	3000	3000	660	900	14
Plan 9	9000	4500	6000	3000	990	1350	21
Plan 10	12000	6000	6000	6000	1320	1800	28
Plan 11	15000	7500	9000	6000	1650	2250	35
Plan 12	18000	9000	9000	9000	1980	2250	40
Plan 13	21000	10500	12000	9000	2310	2700	47
Plan 14	24000	12000	12000	12000	2640	2700	52
Plan 15	27000	13500	15000	12000	2970	3150	60

6. Additional Major Tax Forms
Customers may frequently request tax forms other than the six 1040 items. If you wish to carry additional major tax forms, you may request copies by filling in the form number and quantity requested on the back of Form 8628.

7. Facilities to Receive Truck Shipments
It is cost beneficial to send large shipments via tractor trailer. IRS authorizes inside delivery if necessary.

If your facility does not have a dock, or a tractor trailer delivery cannot be accommodated, please check the "no" box.

8. Branches
This item should only be completed by Banks and Post Offices ordering for, and distributing to, branches within their system.

9. Remove
Check only if this account is a duplication of another existing account, if you are consolidating ordering points, or if you are withdrawing from the program.

General Information
Shipments of some 1040 plans will be sent directly from the printers. You may receive forms and instructions separately. If you do not receive the 1040 family, 1040, 1040 A, 1040 EZ, Schedule A/B, and instructions by December 20, please call the **hotline 1-800-221-1535.**

The hotline (800-221-1535) will once again be in service during the tax season. Call this toll-free number if you have any questions about your order or if you need to reorder tax materials once the season has begun.

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